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ABSTRACT

The FORM approach is designed to help persons in the senior population with the task of filling out the forms or applications required for a myriad of societal and human needs. The acronym represents a four-part approach consisting of: Facing the issue; applying Overview; Rewriting headings as questions; and Matching information as appropriate responses to the original form. The consistent application of FORM is expected to alleviate the anxiety and intimidation experienced by many adults when facing the task of form completion. The ultimate gains may be in the areas of self-confidence and self-concept as a result of increased independence in personal management. (Author/SR)

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TITLE : The FORM Approach to Reading Forms

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Title: The FORM Approach to Reading Forms

Abstract:

The FORM approach is designed to meet the needs of those persons in the senior population who bring life experience to the task of filling out the forms or applications required for a myriad of societal and human needs, but who nevertheless seek assistance in completing the product. The acronym represents a four-part approach of Facing the issue, applying Overview, Rewriting headings as questions, and Matching information as appropriate responses to original form. The consistent application of FORM is expected to alleviate anxiety and intimidation experienced by many adults when facing the task of form completion. The ultimate gain is anticipated in the areas of self-confidence and self-concept as a result of increased independence in personal management.

"F O R M" Approach to Reading Forms

Background:

There are disparate strands of concern in the current structure of the population which are variously classified as "senior" for social, economic or legislative purposes. The expanding opportunities for benefits to this population appear to demand increasing requirements of qualifing, personal applications for either assistance or participation. Consistently, the initial eligibility of the applicant may be determined by one's chronological age. This, however, may preclude a consideration of other factors which in the best interests of the applicants should not be generalized. In other words, it cannot be assumed that all adults who qualify by age as "seniors" share the same or similar experience within their range of calendar years of life experience. Following the educational practices of considering all factors in a youngster's development, so might the "team" approach be effective for those of the senior age range. One viable purpose would be to evaluate a person's experiential background and abilities which relate to the specific situation or needs. A single suggestion, describing an approach to filling out forms or applications has been designed to encourage independence for some members of the adult population who, though capable, may otherwise seek and rely on staff or

family assistance without any attempt to begin the individual task at hand.

The continuing flow of applications and forms for assorted needs is openly acknowledged to the degree that staff assistance or even complete service may be offered to a population of senior adults within either residential, recreational or educational facilities,including community libraries. Since the forms are intimidating for reasons to be described, and assistance may be available, the applicant is likely to shy from, postpone or even neglect a task. Even the more able adult who qualifies by age to seek staff service may choose assistance above initiative and independence not only because of apprehension about the task but also the convenient availability of assistance.

The approach to be described has been field-tested with adults living in an apartment complex in suburban New York. The complex is described as "senior housing", for which residents qualify by fulfilling requirements of age', income and previous residence in the geographic area.

The Program:

In conjunction with the provision for group recreational and social activities for residents, I offered a program, through the administrative authorities, for these men and women to learn about a way to fill out

forms and applications. With such endorsement,three weekly afternoon meetings were listed on the monthly calendar of events, which gave continuity to the new program. The instructor's name and university affiliation were included in the announcement. This created an interesting academic contrast to the composite listings of social functions scheduled during the hours either prior to or following the meeting on "Filling out Forms".

Beginning with the first session, attendance and active participation of the initial group of fourteen, [eleven women and three men], were maintained. On occasions of absence, messages of regret were sent through friends or the director. From the outset, it was clear that residents came from varied backgrounds of social, educational and cultural experience. Yet, within this wide variation, each contributed to the group discussion and activity. Those with past experience acknowledged the difficulties involved in the task of completing a form and supported the accommodations which were proposed to offset them. Several residents named family members or staff personnel who were solicited for immediate assistance when *any* form or application was received in preference to attempting the task independently. Several types of situations were named, ranging from magazine subscriptions to medical

records. Although there was wide variance in the specific examples, there was agreement in the shared feeling of apprehension about being accurate or "right". The men and women stressed that any incorrect response was interpreted as lack of ability or failure to comply with regulation. Whether true or not, this was their perception of inadequacy. Ultimately, any failure to submit appropriate "papers" meant a loss of opportunity.

The Approach:

Having agreed on the interest and concern, the program was presented in two ways. Initially, the approach was described through the rationale of the acronym FORM. This was followed immediately by application of FORM on a sample form from a government agency . An outline of the letters FORM, arranged vertically on letter-size paper was distributed for entering notes and examples as given or developed in discussion. Retaining the outline for reference, each participant was then given an application in use by the Social Security Office for replacing a lost card. The FORM approach to completing the application was then practiced.

What FORM represents to the participants through filling in the outline with the instructor's explanation and guidance and group discussion:

F Face the issue [application form]. Where did it come from?

Who sent it? What is it about? [Questions are entered in section E, first upper quarter of outline.]

O Overview. Look it over. Are there headings in darker print? Do any words stand out because of print or placment? Are there any "boxed" sections? Is there unfamiliar vocabulary? Are the parts numbered? What information is related to the source and purpose of the form? [Questions are entered in section O, second quarter of outline.]

R Rewrite your own form. Copy a question or change any word[s] or statement into a question which may be given as a heading on an application or form i.e. in the space which asks for MAILING ADDRESS, applicant writes the question, "What is your mailing address?". [Write sample questions in the third quarter section of the practice outline, R] In the fourth and final section on the practice outline, M, the participant [with the guidance of the instructor] enters a sample answer to a sample question taken from section R [Rewrite]. It is this step which allows the respondent to guage the spacing of the response, the size of the writing, and the use of abbreviations. *The limitations of space provided for information was given repeatedly as a source of*

difficulty, and can be viewed as intimidating to a capable applicant.

M Match your information to the headings on the original form.

[At this time, the applicant enters the information, which appears on the practice form, on the original form determining spacing and abbreviations as necessary.]

The Rationale of FORM from the Instructor's View:

1. Being aware of the *source* of any form can give some direction to expectations of information related to its purpose.

2. Distinguishing among familiar, unfamiliar and unclear *vocabulary* will acknowledge what is known, and present specific needs within the context of the whole document. Clarification of words can be made prior to completing the original form.

3. Formulating questions of statements gives direction to possible responses, and demonstrates the *implication of a question* in the word[s] or statement which may be highlighted by print [i.e. italics] or format. [i.e. heading].

4. Preparing responses on the personal practice form outline allows for *spacing and editing* preparatory to final copy which may provide limited space for response. This becomes an important step for those in need of

adjustment for handwriting or vision accommodation.The preparation of the information lessens this aspect of reported difficulty.

5. Matching the prepared practice response with the original form *confirms the placement and content* of the information requested. Unfamiliar words used on the form would have been clarified in the pre-write stage, avoiding posssible misinterpretation or necessary editing and corrrection.

6. Consistent application of the FORM procedure, may be expected to *diminish anxiety* and lessen intimidation experienced by those members of the senior population who are able to draw upon their skills and experience to *perform independently* in fulfilling these types of form-completion tasks by [1] reinforcing the concept of the relationship between the source of the form and the nature of the information requested, [2] providing a consistent pattern of approach, [3] legitimizing the practice of pre-writing to accommodate physical needs, and [4] encouraging preliminary initiative in determining the necessity of professional assistance, and finally, [5] providing the group experience, where possible, of acknowledging a need and fulfilling that need to provide an unpressured, though structured teaching and learning experience. The sequence of the procedural steps is adapted to individual strengths and

weaknesses. Review of the procedures can, with time and practice, be made routinely using brief practice notes of specific requested information culled from newspapers and magazines as well as mailings. Ancillary gains in self-confidence and self-esteem can emerge through an opportunity to recognize one's abilities and to be involved in decision-making in confronting one's needs.

A concluding note:

My initial experience of presenting FORM to the eleven men and women reinforced the purposes of the design. Informal reactions, unsolicited or invited, were positive within a context of several perceptions. Those "seniors" who had wide life experience were pleased to have the opportunity to share and apply their abilities. Those who were less adept were pleased to be improving these skills while acknowledging other types of experience in their lives. Several women spoke of their spouses as having assumed full responsibility of "paper work" to the point of exclusion of partners. The same individuals noted that their younger counterparts are sharing more of these tasks. Formal evaluation was intentionally eliminated from the program to avoid any suggestion of a "study" or "experiment". I continue to support available staff assistance to contend with the myriad of unmet needs of the "senior" population. At

the same time, I urge the encouragement of personal independence within the parameters of individual abilities.

Finally, although there are resources available for instructional use at secondary and post-secondary levels, these materials are usually directed toward developing experiential background for initial vocational needs of potential applicants. The FORM approach is concerned with meeting the needs of those persons who *bring* experience to the process but require particular assistance in completing the product.

The ultimate purpose of FORM is to provide for these persons, identified in the senior population, a measure of independence in fulfilling a necessary task which has, in large part, been assumed by others *for* them and subsequently, been referred to others *by* them.

[Author's Note: A model design of FORM is available.]